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Proposed Implementation Plan: Permit Reform Recommendations

April 18, 2017

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Overview

- Council resolution on Sept 22 2014 initiated the permit reform effort
- Matrix Consulting Group began in February 2016 – recommendations from their work have been presented today
- Project team worked with the consultants to share information and try to ensure the recommendations were based on an understanding of State requirements, local ordinances, and our processes and practices
 - Participation included staff from DPW Inspection Services, Planning and Zoning, City Attorney, Fire Marshal, Water Resources, and Burlington Electric
- Historic Preservation review was preformed by another firm, Calfee. Those recommendations will be presented separately

Project Goal

To develop an improved permitting process that is:

- Consistent, efficient, transparent, and predictable
 - Ensures public health and safety
 - Supports energy efficiency, and
 - Encourages investment and reinvestment
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- This goal, as outlined in the RFP, guided the team's work and proposed action plan

Public Engagement

- The consultants led an extensive public process through June 2016, which included:
 - Online public survey received 614 responses
 - Three public forums, which attracted over 40 attendees
 - Five focus groups were held, targeted to specific segments of the community (Real Estate Professionals, Architects, Contractors/Developers, Home Owners, and Business Owners)
- In addition, many individuals spoke separately with the consultants or the CIO to share their challenges and ideas

Strengths of Current Process

- Staff are generally available on a walk-in basis to provide feedback and information to members of the public
- Educational materials available online and at offices, including copies of codes and ordinances
- Informal pre-application meetings with planning staff are encouraged for applicants to discuss their project and gain input from staff
- Many building permits are issued same-day, and few require revisions and resubmissions by applicants. Trades staff assist applicants, many with little experience in the trades, with understanding the code requirements and achieving approval
- Trade inspections scheduled for specific times

Key Findings:

- Service levels are generally acceptable but notable opportunities for streamlining
- Separation of functions and locations create challenges
- Technology utilization is not currently meeting the needs
- Further opportunities for improvements in inter-departmental cooperation
- Some additional staff and changes to existing staffing could greatly enhance service levels.
- Communication, training and educational materials needed for all.
- Current resources are insufficient to implement all recommendations in a timely manner.
- A focus on “customer-centered” service should be a priority.

Recommendation Themes

- **Organizational Structure:** Enhancing organizational structure to encourage operational efficiency and accountability, and to improve the customer experience
- **Process:** Improving and streamlining processes to improve efficiency, decision-making, and service delivery
- **Customer Service:** Providing better education and materials and developing a culture focused on customer service to improve the customer experience
- **Technology:** Better utilizing technology to improve internal efficiencies and provide enhanced customer capabilities
- **Fees:** Ensuring fees charged cover all direct and indirect costs associated with permitting operations, allow for the ongoing support and enhancement of operations and technology, and are clear and predictable for applicants

Implementing the Recommendations

- Upon review of the final recommendations presented by Matrix, the City team worked to develop a plan we believe will allow us to successfully address and implement the recommendations
- Our plan was, and future proposals will be, developed with consideration for our need to support two categories of customers through the permitting processes:
 - Individual Property Owners
 - Development and Construction Professionals

Implementation Plan

- The implementation plan details our proposed actions, estimates of difficulty and cost, and projected deliverable dates for each action
- Implementation of all of the recommendations will take a number of years, and many will require additional resources. Many changes that can be implemented over the next year will result in significant improvements to the customer experience
- A number of recommendations require further research and planning, proposals will be developed and presented as work is completed
- Permit Oversight Committee (POC), the current project team, will be held accountable for overseeing implementation and managing to the plan

Key deliverables – Organization & Process

Organizational Structure

- Consider creation of a consolidated department responsible for all Zoning and Inspection Services activities (1, 2)
- *Arrange for P&Z, ISD and Code to offer combined, co-located office hours (3)**

Process

- *Develop a plan to improve the Technical Review Committee's (TRC) process (12, 13)*
- *Begin streamlining duplicative permits (15)*
- *Develop a process for regular review of codes and ordinances to ensure currency (53)*
- Zoning
 - *Hire a planning technician at Planning & Zoning (5)*
 - *Develop a plan to transition responsibility for UCO inspections from Code to P&Z (19, 20)*
 - *Propose changes to increase the threshold for administrative review (14)*
 - *Research and propose an alternative to the N/A determination (11)*

* Note: items in *italics* are anticipated to be delivered by the end of 2017

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Key deliverables - Process

Process (cont'd)

- ISD
 - *Research and implement improvements to trades inspection scheduling (23)*
 - *Explore and make a recommendation about the value of adopting the International Residential (29)*
 - Hire a permit technician to provide improved service to applicants at ISD (4)
- Implement a two-day inspection standard for trades inspections (24) and contract or hire staff to support the additional workload, if necessary (25)
- Identify where ISD can offer over the counter permits to streamline the customer experience (16)
- UCO
 - *Develop a plan for issuing the UCO upon completion of all inspections (17, 18)*

Key deliverables – Customer Service

Customer Service

- *Ensure regular customer service trainings for staff (9) to further enhance customer-focused culture (8)*
- *Develop a plan for performing an annual customer survey (33)*
- *Make all forms available online as fillable PDFs (36)*
- *Catalog and post online all interpretations and determinations (10, 37)*
- *Develop process metrics and a proposal to regularly report performance to the public (6, 7)*
- *More proactively notify customers of open permits to ensure permits are not left for future problems (22) evaluate the benefit of cleaning up aged permits (21)*
- **Create a development guide (34) and process matrix (35) to provide customers with an easy-to-use guide to the permitting process**

Key deliverables – Technology & Fees

Technology

- *Provide the ability for inspectors to complete data input from the field (27)*
- Identify and implement the most appropriate and cost-effective permitting application through a formal RFP, and provide staffing to support ongoing maintenance of the application (39, 40)
- Provide an online portal to allow applicants to submit applications, track progress, and schedule inspections online (26)
- *Explore and develop a proposal to address the need to improve GIS accuracy (41)*

Fees

- Begin an evaluation of fees to ensure they cover all direct and indirect costs (28)
- Ensure fees charged support the procurement and ongoing support of technology necessary to support staff activities and increased customer functionality (42)

Estimated costs

	FY17	FY18	FY19	FY20	FY21
Staffing					
Permit Tech			52,000	54,080	56,243
Trades Inspections (staff or consultant)			60,000	62,400	64,896
UCO Inspector			60,000	62,400	64,896
IT to support new app				75,000	
Education					
Create PDF Forms	5,000				
Create Development Guide and Matrix			30,000		
Annual customer service training		7,500	7,500	8,500	8,500
Software					
Consulting- Software RFP		20,000	70,000		
Software licensing			275,000		
Software annual maintenance				55,000	55,000
Software implementation			100,000	100,000	
Renovation					
Combined office hours		tbd			
Create one stop shop			50,000		
Total	\$ 5,000	\$ 27,500	\$ 654,500	\$ 417,380	\$ 249,535
Other potential expenses, to be evaluated as part of proposed plan					
Regular review of ordinances					
Interim scheduling software					
Conducting an annual customer survey					
Improving GIS accuracy					
Support office hours at one location					
Creation of one department					
Closing old permits					

Next steps

- DPW and Planning Commissions expected to complete discussions and make final recommendations in May
- Tentative initial Council presentation on May 1st
- Proposed implementation plan will be brought back to Council for approval following the recommendation of the Commissions
- Following approval of City Council, the project team will begin implementation of the plan
- Complete Historic Preservation engagement and prepare implementation plan for recommendations to present at a future meeting (est. June)